

STATE-WIDE SERVICES—AFFORDABLE
LONG TERM CARE PLANNING
WWW.ALTCSPLANNING.NET
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ARIZONA LONG TERM CARE SYSTEM
AHCCCS/MEDICARE COST-SHARING
LEGAL DOCUMENT PREPARATION
FINANCIAL PLANNING
VETERANS BENEFITS

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Release of Information: In order to obtain the finest possible long-term care option, a Montgomery & Associates, Inc. consultant/assistant will need to collect information regarding the individual seeking our services. Facts such as age, gender, care requirements, mental status, health history, and payment information are required. The client understands and authorizes Montgomery & Associates, Inc. to utilize such information for long-term care planning purposes only.

It is ultimately the client's responsibility to assess and decide on the most suitable planning options.

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****IMPORTANT NOTICE****

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Please note that the Long Term Care Planning Services are of a financial planning nature and are not specific “legal” advice.

The firm bases their fee on the asset numbers disclosed at the initial consultation and reserves the right to increase the total fee if the initial consultation asset numbers and the actual asset numbers are different and would have caused the fee quote to be in a higher range on the sliding fee schedule. Additionally if changes with regard to resources or income cause additional planning to be completed, an additional fee may be charged based on the amount of the resource change and/or the costs associated with preparing an income-only trust. Finally, if the firm researches and finds additional resources or income that the Client had not disclosed to the firm, the firm reserves the right to claim a 10% finder’s fee based on the gross value of the resource or income found.

I (we) hereby state that the above information has been reviewed by me (us) and understand the information presented. I understand that if I am acting on behalf of another individual I (we) understand and acknowledge that the information has been reviewed and understood on their behalf.